

Social work on the whiteboard: governing by comparing performance

Hjärpe, Teres

Veröffentlichungsversion / Published Version
Zeitschriftenartikel / journal article

Empfohlene Zitierung / Suggested Citation:

Hjärpe, T. (2019). Social work on the whiteboard: governing by comparing performance. *Social Inclusion*, 7(1), 185-195. <https://doi.org/10.17645/si.v7i1.1829>

Nutzungsbedingungen:

Dieser Text wird unter einer CC BY Lizenz (Namensnennung) zur Verfügung gestellt. Nähere Auskünfte zu den CC-Lizenzen finden Sie hier: <https://creativecommons.org/licenses/by/4.0/deed.de>

Terms of use:

This document is made available under a CC BY Licence (Attribution). For more Information see: <https://creativecommons.org/licenses/by/4.0>

Article

Social Work on the Whiteboard: Governing by Comparing Performance

Teres Hjärpe

School of Social Work, Lund University, 222 21 Lund, Sweden; E-Mail: teres.hjarpe@soch.lu.se

Submitted: 15 November 2018 | Accepted: 16 January 2019 | Published: 28 February 2018

Abstract

This article explores a number-based comparative logic unfolding around a particular kind of meeting in a social work setting: a daily and short gathering referred to as a “pulse meeting”. At such meetings, staff gather around a whiteboard visualizing individual statistics in terms of the number of client meetings performed or assistance decisions made. The statistics function as a basis for further division of work tasks. As such, it is a particular way of representing what social workers do at work. Ethnographic fieldwork conducted in the social services revealed how such openly exposed individual performance and the related number-based comparative logic can trump alternative logics ranging from the overall collective performance, competing views on clients’ needs and efficiency, and the social worker’s sense of professionalism. When participants of the study compared themselves to each other and in relation to standards and goals, certain conclusions were drawn about what should be done by whom and in what order. Such conclusions became embedded in an objectivity status difficult for anyone to argue against. Finally, the number-based logic also found its way into the counter-practices formulated by social workers unsatisfied with what was visualized on the whiteboard.

Keywords

attention displacement; comparative performance; performance measurements; social work

Issue

This article is part of the issue “‘Producing People’ in Documents and Meetings in Human Service Organizations”, edited by Malin Åkerström (Lund University, Sweden) and Katarina Jacobsson (Lund University, Sweden).

© 2019 by the author; licensee Cogitatio (Lisbon, Portugal). This article is licensed under a Creative Commons Attribution 4.0 International License (CC BY).

1. Introduction

Different kinds of numbers are used in many different ways in modern professional practices, such as social work (Shore & Wright, 2015, p. 23). At an early planning stage, a social work organization may decide to send out a survey to do an inventory of needs to prioritize in a certain community. In direct client work, social workers use assessment forms to gather information about a client’s social and psychological status. Time is measured in terms of the hours and minutes it takes for the elderly and disabled to shower or clean their house in order to calculate their assistance need. As employees, social workers themselves fill out work environment surveys and discuss the results presented in diagrams at staff meetings. Numeric information about anything from gender representation to the costs and effects of interventions are reported to management, politicians, and government authorities. As Kurunmäki and Miller

(2006) point out, to be able to work and operate in modern organizations, one needs to acquire an administrative and “calculating” knowledge. One needs to continuously use, interpret, compare, and value work with the help of numbers.

The role that measurements should have in social work practice is debatable. Measuring initiatives are often accompanied by efforts to gain objective and neutral knowledge—knowing “for real” as opposed to feeling and guessing (Martinell Barfoed & Jacobsson, 2012; Porter, 1994). Such efforts can be challenging, as the character and goals of this work are constantly changing, varied, nuanced, complex, vague, uncertain, and filled with conflicts and dilemmas (Parton, 1998). While some scholars, authorities, and practitioners invent and spread models for measuring new aspects of social work (e.g., Elg, Witell, & Gauthereau, 2007; National Board of Health and Welfare, 2014), others insist that such measurements reduce complexity (e.g., Liedman,

2013) and risk making robots out of the practitioners (Baines, 2006).

One specific way of using numbers in work settings is to measure and compare professionals' individual performances in order to monitor that work is done according to predefined and quantified standards and goals. A concrete example is to set a standard of how many clients a social worker should attend per day, and to connect funding to the level of compliance with the standard. This use of numbers as a governance tool directly affects professionals in their everyday work. It is described as something relatively new for the public sector, belonging to reforms called New Public Management (Hood, 1991) or managerialism (Pollitt, 1993). A metaphor often used to describe the content of such reforms is that managers start "steering the boat", focusing on goal fulfilment, instead of "rowing it" by focusing on quality in the processes. Rowing includes letting professionals' praxis implicitly define the standards, whereas steering implies formal and quantitative measures (Hood, 1991, p. 4).

Authorities and employers' organizations tend to argue that performance measures are a good way to guarantee transparency, value for money, and legal security (SALAR, 2014). On the other hand, studies point to several unintended or "perverse" effects of using such strategies to steer professionals, all relating to the saying "what gets measured gets done" (Bevan & Hood, 2006). Some examples are cherry-picking easily treated clients (Gilman, 2001, p. 601), double booking clients to achieve higher visiting rates (Gallina, 2010, pp. 2–4), "parking" clients in available programs rather than programs known to be efficient and worthwhile (Brodtkin, 2011, p. 67), playing "tick-box games" when reporting statistics (McGivern & Ferlie, 2007, p. 1378), and staff developing a "silo-mentality" of being less inclined to collaborate with colleagues (Lodge & Gill, 2011, pp. 153–155).

The research mentioned above addresses restructuring changes in different professional contexts, such as management, health care, and social work, and commonly has the role of numbers and quantification to be one of several aspects distinguishing the reforms. This text takes a closer look at the function of numbers, in interactions, negotiations, and practices unfolding around performance measures in a social work setting. For this reason, the analyses will build on data on interactions at so-called "pulse meetings", at which managers gather their staff around a whiteboard visualizing individual performances and relating them to standards and quantified goals. This is a strategy rooted in "lean management", translating efficiency success from the car industry to public sector work, such as health care, social services, and education (Baines, Charlesworth, Turner, & O'Neill, 2014). While some studies have investigated consequences and changes related to performance measurements in social work practice (e.g., Abramovitz & Zelnick, 2015; Baines, 2006; Brodtkin, 2011) and similar "whiteboard management", mainly in hospital settings (Hauge, 2016; Stray, Sjøberg, & Dybå, 2016), this study

particularly focuses interaction related to comparisons of professionals based on numerically described performance. As Espeland and Stevens (2008) point out regarding measurements in general, they are always socially transformative to some extent. Complexity is reduced to enable comparisons over time and between agents, and in the next step the comparisons lead to values and actions. The purpose of this article is to analyze what conclusions professionals draw and what actions they take when they are exposed to statistics at pulse meetings. More specifically, how is this visible in the participants' interactions? This focus resonates with other scholars (cf. Timmermans & Epstein, 2010, p. 78) highlighting the importance to empirically investigate and discuss expected, as well as unforeseen and unintended, consequences of governing initiatives containing different kinds of standards and numbers.

2. A Sociology of Knowledge Approach to Governing Number Practices

A sociology of knowledge and quantification perspective is of overall relevance to this study. As scholars writing from this standpoint (e.g., Best, 2001; Espeland & Stevens, 2008; Porter, 1994) commonly argue, I look at numbers and statistics as a knowledge form that is constructed and used for different purposes. What numbers reflect and represent is a product of social negotiation and interactive processes, and once produced they influence and affect their social surroundings.

From this perspective, questions can be asked regarding what is done with and accomplished by numbers, by whom and in what way (Espeland & Stevens, 2008). One of several approaches to these questions that has already been elaborated theoretically is that citizens in general and professionals in particular are "governed by numbers". Within this theoretical framework, statistics, indicators, audit projects, budgets, evaluations, standards, and ranking systems are seen as tools used by the government to discipline society, yet simultaneously "hide" or make the power exercise less explicit (Miller & Rose, 1990; Power, 2004; Rose, 1991). A common reference is Foucault's conceptualization of "governmentality" (Foucault, 1978/1991, p. 100), referring to a strong yet indirect and distanced form of political power, not least employed within neoliberal government (Dean, 1999, p. 1). Governmentality partly works through "government of the self", in which the above mentioned and often subtle tools create instructions on how to feel, think, and act. In this sense, one can say that professionals participate in governing over themselves (Rose, Valverde, & O'Malley, 2006, p. 89). In the analyses of this article, the whiteboard used for comparing performance is approached as such a tool.

At the same time, even though such governance projects are implemented "from above", their actual role, function, or meaning is achieved socially. What becomes of such initiatives is a result of negotiations,

adjustments, and translations to local practices, and there can also be resistance and countermoves (Saetnan, Lomell, & Hammer, 2011, p. 11). O'Malley, Weir and Shearing (1997, pp. 504–505) pointed out as a weakness in contemporary governmentality literature, the tendency to ignore the often messy, contradictory and tense reality where the governing takes place. Instead, intentions from government or management are put at the center and presented in schematic and abstract ways. Resistance from citizens or employees becomes a matter of obstacles, deviances or failures to be overcome, and is not seen as part of negotiations inherent to all kind of governing with potential to shape and influence the governments' intentions (O'Malley et al., 1997, p. 510). Thus, governmentality ideas have been criticized for downplaying the agency of the professionals and alternative approaches have been suggested (see Paulsen, 2014, pp. 39–72) in order to capture workplace resistance. Ackroyd and Thompson (1999, p. 6) who provided one such approach argued that even in organizational contexts where management and control systems are more sophisticated, resistance—or what they call misbehavior—takes on new forms rather than disappears. For the present study, recently developed ideas to study (among other things) workplace resistance, coined by Bruno, Didier and Vitale (2014) as “statactivism”, have inspired the analysis. Statactivism is defined as “a particular form of action within the repertoire used by contemporary social movements: the mobilization of statistics” (Bruno et al., 2014, p. 198). The resistance strategies consist of countering a quantification stemming from the state, an authority or an organization's management, with alternative and affirmative or nuancing and questioning quantification. Within this framework authors have identified several more specific ways of using numbers to exercise influence “from below”. Whereas the creators of the statactivist approach have an emancipatory purpose documenting those strategies (Bruno et al., 2014, p. 200), this article uses their framework for understanding the possibilities and limitations of this particular kind of resistance.

The above-mentioned ideas guide the analysis of this study in the way that practices in terms of reactions, actions, conclusions, clashes, and counter-practices to governing intentions are at the center of attention. In that sense, a theoretical contribution is made to governmentality theory through the identification of moments where governing intentions clashes with or are disrupted by resistance or alternative logics stemming from the social workers, as well as how such tension plays out in the everyday interaction.

3. Ethnographic Fieldwork in a Social Service Setting

With the overall aim to study practices unfolding around a governing initiative in a work setting, an ethnographic approach was selected as a research strategy (Neyland, 2008, p. 4). Over seven months in 2017 (from January

to July) I conducted ethnographic field work (participant observations, interviews, documents, and photographs) at five different social service offices in Sweden. The aim was to identify and study situations in which participants interacted around numbers related to work performance. I shadowed managers participating in leadership courses, and I observed and interviewed social workers, administrative staff, and managers during “ordinary” work days. Out of the more comprehensive material from the fieldwork, this article draws on data from one of the studied units in which the management had taken inspiration from lean management. The data consist of field notes from five full-day observations, four individual interviews, two pair-interviews, and a selection of documents and photographs.

As a participant observer, I did not exclusively strive to be a “fly on the wall” or a fully participating member, which can be considered the two extremes within ethnography (Emerson, Fretz, & Shaw, 2011, pp. 1–3; Fine, 1993, p. 281). During observations, participation altered from at times being more restrained, in line with what Czarniawska (2007, p. 21) calls “shadowing”, to other times being more active, including taking part in participants' discussions and decisions (Atkinson, 2015, p. 39). Strategic decisions about the level of participation were made situationally. An overall aim of using participation as a means to get access to participants thoughts and feelings (Fine, 1993, p. 282) had to be adjusted to what was possible in specific situations. At some occasions, as in smaller management meetings, a high level of participation seemed to make the participants more comfortable with my presence. In other moments, such as bigger staff gatherings including the “pulse meetings” to be described in the next section, less interference seemed expedient. Observations with a “passive” participatory approach enabled detailed field notes to be taken in place. When participation was more active, field notes had to be complemented afterwards.

During fieldwork I applied interviewing in two different ways. Combined with observations, “mini-interviews” were continuously conducted with several participants in order to enhance my own understanding of interactions taking place and how they were perceived by the participants. Such data were written down by hand, forming part of the field notes. Longer interviews were tape-recorded and made with the help of a thematic interview guide.

After transcribing interviews and field notes, a qualitative content analysis was initiated. In a first step, the data were thematically coded along several themes that had emerged during fieldwork, as well as when transcribing and reading the interviews and field notes. In a second step, the data were re-coded along a fewer set of selected themes. Even though the interest in “number-based governance” was present already at the beginning of the field work, the results presented in this article have emerged through a process of interpretation where data collection, the reading of previous research and theory,

and analyzing have been altered in a so called “iterative strategy” (Dellgrán & Höjer, 2003, p. 11).

I have collected all the data used in this article, although being part of the research project “Documents, Forms and Paperwork—Expanding Documenting Practices in Health Care and Social Work” led by Katarina Jacobsson and Elizabeth Martinell Barfoed at Lund University in Sweden. The project has been approved by the Swedish Regional Ethical Review Board (Dnr 2013/348). I obtained access to the field initially by approaching representatives of the social services’ management. Prior to the field work all participants were informed about the study, either at staff meetings or through internal e-mail correspondence. In the selection of participants for recorded interviews I strived to get a mix of managers and social workers, as well as participants with varying amount of years of experience in the field. It was voluntary for those asked to give the interviews and some declined with reference to heavy work load. In line with the codes of research ethics, already in the field notes and transcriptions, alternative names were given to the participants and the municipalities. All names appearing in this article, including the whiteboard on page 5, are fictitious. The observations have mainly been concentrated on the professionals and not the social work clients. When participants have been talking about clients, no confident details were written down.

The language in all of the gathered material is Swedish. For the present analysis, selected extracts of the data have been translated from Swedish into English by me.

4. Lean Management and the Function of Numbers

4.1. Whiteboard Statistics for Efficient Assistance Assessment

At the current social service unit, the social workers’ main task was to assess clients’ (elderly, disabled, and very sick people) rights to assistance in terms of home care activities (i.e., cleaning, shopping, going to bathroom) or shorter or longer stays in nursing homes. Approximately a year before the fieldwork, the management took inspiration from lean management to streamline and speed up the work. According to the management, problems motivating new strategies were high caseloads, long waiting times for clients, and an overall ineffective working culture in which the professionals watched their own territories instead of collaborating in an efficient way. Among other things the social workers struggled with completing required documentation on time and often had to push required follow-up visits into the future.

Briefly, lean management is an efficiency model used increasingly in public service organizations, the inspiration for which comes from success in the car industry (Baines et al., 2014). The model seeks increased productivity through the identification of “time thieves” and the most resource efficient way to complete tasks with-

out negotiating quality. Standardization of time-frames, caseloads, and activities is the main strategy used to stimulate what is called “the flow”, referring to a case’s way through the organization. In the car industry this process, in terms of the “line of production”, could be described as the steps running “from ordered to delivered car”. The corresponding course for incoming cases at the current social service unit would be “from application to denial or followed up approval of assistance”. The aim is for this process to run “smoothly” without friction and the quality of the product or service is guaranteed by the routinized procedures (Petersson et al., 2012, p. 51).

Michel Power (1997) explains that work or services in general can be judged, evaluated or audited based on different kinds of, and sometimes competing, logics such as its efficiency or its effectiveness (Power, 1997, p. 50–51). While the former is concerned with determining “value for money” in terms of ensuring maximum output from available resources, the latter is oriented towards evaluating if outcomes conform qualitatively to intentions, as defined in laws, policies and programs. In social work such outcomes can be ambiguous and controversial and are constantly being negotiated amongst professionals (Power, 1997, p. 117). Lean management honors routinized procedures, which are meant to guarantee quality. Still, the quality standards, for example in terms of caseload per social worker, specify a lower and an upper limit for how much work the social worker is allowed to invest in each case in order to keep the “production” at a high and steady pace. This makes the model more concerned with efficiency rather than with effectiveness.

Numbers have a distinguished role in lean management in the way that work content is described quantitatively and measured against quantified goals and standards. For example, standards for how much or how many meetings the professionals are expected to “produce” per day are established. Numbers are used to visualize how the staff is performing on an individual basis. A big whiteboard, or a “pulse-board”, as the participants in this study called it, with such statistics is often put in a select place where staff can easily gather. It was described by a manager as a “visual protocol of decisions and ongoing activities”. What is measured and visualized on the whiteboard varies according to the tasks being executed. At the current social service office, it even varied between the different teams into which the social workers were divided.

4.2. Taking the Pulse of the Social Workers

Every morning at 8 am, five work teams gathered around five whiteboards for a 15-minute meeting, standing on their feet. One manager explained: “Sitting down would make the staff too comfortable”. For one team, the board looked like Figure 1 (after my reconstruction, translation and anonymization).

In the first column from the left, the social workers are listed by name, designating rows that account for ac-

TEAM 2	MON.	TUES	WED	THURS	FRI	LAG	FOLLOW-UPS
EVA I	Home visit x 1 Covering for Stig Improvement meeting 14-16	Documentation x 2	Home visit 10:30 Fire Alarm Training	Field visit nursing home Covering for Stig	/	4	2/8
LOTTA I	Improvement meeting 14-16	Home visit x 2 Covering for Stig	Documentation	Home visit x 1 Document x 3	Union represent. work	11	0/11
STIG	Sick	Sick	Sick	Sick	Sick	0	3/12
CECILIA II	/	Documentation all day	Covering for Stig	/	Home visit x 2	20	1/21
PER II	Improvement meeting 14-16	Introduction for newly employee 2	Home visit x 1	/	Documentation x 2	5	0/5
JONNA I	Documentation Home visit x 1 Improvement meeting 14-16	Planning for home visits Documentation x 1	/	Home visit x 2 meeting 14-16	9-12 Routine Improvement group	0	2/6
VIVEKA III	Home visit x 1 Improvement meeting 14-16	/	Fire alarm/Bolt training	/	Covering for Stig Document x 3	15	4/13

Figure 1. Whiteboard for Team 2.

tivities scheduled for each day of the week. For example, Eva, who is listed first, will make one home visit on Monday at the same time as she is covering for Stig, who is ill. Jonna has planned to finish the documentation of one assessment as well as going on one home visit. The second column from the right indicates their respective “lag”, representing the number of assistance decisions made but yet not documented. A standard was decided of maximum fifteen investigations “lagging” before the managers would actively “take action”. Finally, the last column to the right states how many “follow-up-meetings” the social worker had completed so far that month.

Next to every social workers’ name are marks representing the number of days that the social worker has covered for a colleague who is ill or had to take on an urgent matter. For example, Eva has covered for a colleague one day, whereas Viveka has covered for colleagues four days. The visualization of the extra burden of handling absent colleagues’ tasks was an initiative from the staff and not part of the initial pulse board logic, something I will elaborate further below.

The pulse meetings are led by a front-line manager with the intention of “taking the pulse” of the staff. The manager asks every social worker about their plans for the day and if they need help. How they are performing in relation to the standards and compliance is routinely commented on and celebrated. Scrutinizing individual schedules helps the manager determine if work is equally distributed. If one of the social workers has a “calmer” day, the manager can actively engage him or her in helping a colleague who needs help. This strategy resonates with one of lean management’s slogans, “putting the team first”. According to this philosophy, the main

purpose is not to stimulate competition between social workers for individual gains, but to use it for work division for the team’s common goal performance. Numbers are used for social control where work is divided based on a number-based solidarity.

Information about clients or the content and result of the activities performed is not exchanged at these meetings that strictly report performance in relation to standards and goals. For example, the manager does not ask questions about how a client is doing or what was decided at a home visit. Such information was addressed in other forums when necessary. In Hauge’s (2016) words, this “whiteboard management” represents a specific way of visualizing and valuing work in organizations where parallel working value systems, related to professionals’ traditions, norms and work ethics, exist.

5. Findings

5.1. Comparisons as Technologies of the Self

The pulse meetings can be viewed as an occasion for the management to check that the social workers read the information on the board correctly. Through a meeting ritual in which increased or improved numbers get praise and future activities are steered towards goal fulfilment, the manager gives clues as to what conclusions should be drawn. However, the actual comparisons started even earlier by the social workers themselves. Thoughts and ideas about what should be done by whom already appear in the earliest interaction between the observer and the board that seem to give silent instructions for actions. A simplified pulse board can serve our analysis (Figure 2).

	MON	TUES	WED	THURS	FRI	LAG	Follow ups
EVA	Home visit x1	Documentation	meeting	Documentation x3	Home visit x3	10	0/3
LENA 	u	u	u	u	u	20	3/12
STINA	u	u	u	u	u	7	0/15
STIG	u	u	u	u	u	2	7/10

Figure 2. Simplified whiteboard.

From a quick glance at the board, even an outsider can get some idea about the supposed work distribution. You may note that Lena should work on her lag and Stina on the follow-up visits. Stig, on the other hand, is on a good course and can feel satisfied for the moment. The social workers who have more information about the work may read something else from the board. Putting together different numbers into an overall work description, connecting them to the standards and goals, the picture becomes a bit more complex. They may conclude that Lena is behind because she has covered four times for a colleague, and that Eva is closer than the others to the standard limit for documentations lagging. In any case, the result is a determination of who needs to do what in what order. When the social workers look at the board and start comparing themselves to their colleagues, certain emotions seem to be created, which are reflected in the following quote from an interview with social workers Jeanette and Lidia:

If you yourself have zero cases lagging it makes you happy. But if your colleague has zero while you have twenty, then it doesn't feel that good [laughs a little]. Then you feel like...damn it! (Social worker Jeanette)

Even though it is a hypothetical situation that Jeanette is describing, the point she is making is that she would give herself a lower ranking based on her relatively higher number of incomplete documentations. The connection is simple; feelings of being "superior" or "inferior" stem from having "more" or "less" than colleagues. That such emotions can be converted to initiatives to act is apparent in Lidia's posture later in the same interview. When asked if there were many negotiations regarding who should cover for a sick colleague, she answered: "No,

that is not necessary, it is visible on the board". Later in the interview she stated:

You take a look at the pulse board and you see that someone else has covered two days for someone, and you know that you haven't covered yourself, it is natural to volunteer to cover the next time. (Social worker Lidia)

With the phrasing "it is natural to", Lidia presents the conclusion drawn in terms of offering to cover as something unquestionable and obvious. The examples above show how the numbers on the board create both emotions and actions, something that Foucault (1988) and his followers (see Rose et al., 2006, p. 89) may call "governing through technologies of the self". Some select and measurable aspects of the social workers' performances have been visualized on the board. Once the performances of the social workers are compared in this way, a valuation or rating can be applied (Espeland & Stevens, 2008). The fact that this can be purposeful in the governing of professionals is reflected in the following quote from an interview with case worker Lisa. It seems that she almost automatically, and by herself, draws the intended conclusions from looking at the board:

I want to put an emphasis on the follow-up meetings, now that they are so visible. I mean, I knew before that I didn't keep up with them, but I pushed that stress away, but now you see it every day....My priorities have changed, now I want to be on time with what is visible on the board. (Social worker Lisa)

Lisa describes a switched focus and ascribes it to what is visible on the board, something that has given her guid-

ance. Just as Rosengren (2015, p. 12) points out, when work is characterized by tasks that are not easily measured, what still can be visualized, such as keeping standards, tends to get symbolic and high importance. It becomes a concrete way in which social workers can prove their engagement.

5.2. Collective and Individual Performance

As has been described earlier, team work is encouraged in models such as lean management in the name of efficiency (Baines et al., 2014, p. 447). Comparisons of social workers' performances are accounted for because it can enable a fair work distribution. At the same time, the exposed numbers seem to open the door to a distracted focus on personal performance in comparison to colleagues. In an observational study of pulse meetings in hospital settings, Stray et al. (2016) observed how the reporting and defending of individual work performance made employees uncomfortable while they simultaneously became more self-centered. Meetings were spent thinking about how to account for their own performance instead of participating in joint discussions. A similar process from my study shows that, for the individual social worker, their own performance can trump the collective effort as the motivating force. In one interview, social workers Tanja and Krister were discussing a feeling of satisfaction connected to improving ones' numbers when they are asked if it would feel just as good to change the numbers on the board if someone else had helped them out:

Tanja: No, definitely not! Then it would not be my performance....I would have to be extremely overwhelmed with work to ask for help...

Krister: Yes....I'd rather work overtime myself.

Tanja: Yes...you always try to fix it yourself first, even in the second place you want to do it yourself, only thirdly I would ask for help. I mean, you want to do your job...

In this case, hypothetical numbers giving instructions to hand over cases to a colleague are described as a threat to the sense of "professional pride" reflected in Tanja and Krister's statements. In a study of Canadian social workers, Baines (2006) found different adaptive strategies for meeting requirements of quantified care plans while simultaneously fulfilling their own sense of professionalism towards the clients. One strategy was to work unpaid overtime, as is also mentioned in the above quoted interview, although from a slightly different standpoint: that of being one who "does her job". Krister and Tanja's aversion of letting go of cases illustrates their image of themselves as "performers". Parallel to management's goals of teamwork, there seems to be a strong individualized performance agenda.

Even though some sacrifices are described, such as working overtime, the actions taken in the examples this far are in line with the management's intentions. The respondents describe getting stressed when lagging behind and generally seem to read the board according to intentions. The respondents all possess the ability to compare and calculate their own and others' performances. In other words, they have developed what Kurunmäki and Miller (2006, p. 88) call "calculating selves", postures that modern organizations seek and value. The governing by numbers can be said to run smoothly. However, this was not always the case, and the front-line managers had to take on the role as mediators of the numbers. This is the theme of the next section, in which social worker Vera argues against the messages of the pulse board and offers persistent resistance.

5.3. Arguing over Numbers

Social worker Vera acted with reluctance towards the instructions on the pulse board. She did not seem to feel stressed by numbers indicating that she was far behind in her documentation work, and she did not want to hand over cases to a colleague in order to fulfil the administrative requirements. This frustrated the managers and, at one pulse meeting, manager Pelle took on the role of spokesperson for the numbers. In a long discussion between Pelle, Vera, and her teammate Susan, Pelle continuously referred to Vera's comparatively "bad" statistics in order to influence her priorities, starting with:

Pelle: Yes, yes. I am thinking that all the new cases coming in should be Susan's, since you have nineteen ongoing cases and Susan has sixteen, and on top of that you have ten [points hard at the number ten on the board, making a sound] documentations lagging and Susan has zero. We have to look at the numbers and compare.

Vera: But I gave you one case, right? [turning to Susan]

(Field note from pulse meeting, continues)

According to Pelle, the board shows that Vera should not take on any new cases. Vera tries carefully to nuance the statistics on the board. The statement that Susan already has gotten one of her cases is another way of saying that her statistics are not as bad as they look. Later in the dialogue, she similarly argues that she has cases that will soon be closed that will make her results look better. In the continuous dialogue, when Pelle suggests that she should hand over some cases, and Susan volunteers to take two of her documentations, Vera's response is:

Well, I understand that Susan wants to help me, but I thought that maybe we can solve this another way, because I don't think it's good if we mix the cases. The whole idea with creating our team was continuity

for the clients. If she starts taking cases from me and I from her, I don't think it is good for the clients, and also not time-wise, because I will have to be at even more different places. I will be running around everywhere! (Field note from pulse meeting, continues)

Two arguments are put forth in this phrase. First, in terms of what could be framed as a client perspective, referring to "the continuity for the clients". If they mix cases the client will get different social workers to whom they must relate. Furthermore, Vera perceives it as impractical and difficult for herself, as she'll be "running around everywhere". However, none of these arguments had any effect on Pelle, who keeps on referring to the numbers:

Pelle: Ok, so how are you going to solve it then, because you are not performing well here, Vera!

Vera: Hm, ok, Susan can take the applications to private nursing homes, I don't care as much about them.

Pelle: Then it is decided. And by tomorrow I want those numbers to be more equal. Do you feel OK with this Vera?

Vera: Well, I actually don't want to let go of my cases, I want to be able to make it on my own

(Field note from pulse meeting)

Finally, a statement is released that may be the most essential one in relation to Vera's reluctance, something we might call "professional pride", when she says: "I don't want to let go of my cases, I want to make it on my own".

To summarize, in at least four different ways Vera argues against Pelle in order to keep on working according to her own plans: that the numbers do not reflect her "real" work load, that it is not good for the clients' continuity to switch social workers, that it is not practical for her and Susan, and finally a reference to professional pride and responsibility. Vera offers resistance consisting of not accepting and even offering alternative interpretations to the one presented by the pulse board. Even though she eventually compromises partially, it is with reluctance and there is no sign that she accepts the logic of the numbers. Pelle does not respond with counter-arguments to these substantive questions, but keeps on referring to the numbers, which he uses "factually": "I mean we have to look at the numbers and compare". The numbers seem to be above all other circumstances that can potentially explain why Vera has bad statistics. It becomes a matter of Vera's "subjective qualitative arguments" against Pelle's "objective numbers argument".

As Porter (1994, p. 225) points out, what appears objective always means that someone has to sacrifice some kind of meaning. In this case, Vera has to sacrifice the control she wants over her cases. However, several arguments, values, and positions as subjective as

Vera's can be found behind the numbers on the board, in the managements' rhetoric, and decisions on how to measure. For example, I described earlier how managers talked about social workers "watching their own territory", which they thought counteracted fair resource allocation. What is really at stake then are different and conflicting views on how to prioritize in which one side (social worker) highlights professional ambition and responsibility, user continuity, and pragmatic reasons for the professional, and the other side (management) highlights efficiency and equal distribution of resources. The numbers create the gap, enabling the conflict to never reach the surface. Considering the pulse boards in these examples as Foucauldian "governmentality tactics" (Foucault, 1978/1991, p. 95), the dimension that the actual governance is somewhat hidden can be added. It is obvious that a governance is happening, but not as obvious is who is governing based on what arguments. The numbers speak for what Pelle perceives as a problem and give him the legitimacy he needs. Against this background, the numbers appear as particularly efficient tools for everyday governance of social work practice.

6. Internalization and Countermoves from the Social Workers

Yvonne reads out loud what the two social workers who are ill today had planned in in their schedule. "Who can cover for Petra today?" Someone offers to take Petra's phone but cannot take the home visit. Someone else offers to do it. Yvonne writes on the board who covers for what activity. She puts a mark next to one of the names. One social worker asks: "Do you get a mark just for one home visit?" Yvonne answers: "Yes, I think so", and the social worker again: "Well, I just want to make sure we all do the same, because yesterday, I didn't get a mark". Yvonne changes her mind: "No, you're right", and she erases the mark. (Field note from pulse meeting)

After the pulse boards had been used for several months, the social workers came up with the suggestion that they should also visualize how many times per month one had covered for a colleague. This was only one of several aspects the social workers thought resulted in unfair comparisons. For example, some stated that: "The numbers are misleading, one assessment can take half an hour, others you are stuck with for weeks", or "Just because you have zero lags it doesn't mean that the documentations are of quality", as this could be a result of "sloppy" work. One social worker, who was responsible for quality control and development at the department, explained how she could get suspicious when colleagues repeatedly showed "too" good numbers. When examining their documentations, she often found them to be of lower quality than the others, she stated.

Thus, the social workers in my study were not governed by the numbers without any reflection or resis-

tance. They were attentive to and had opinions about what was visualized and compared on the board, and continuously came up with suggestions for improvements, as in the example with the marks. A reduction in perceived complexity was met with nuancing statistics. Several authors have expressed and given examples of “what is counted is what counts” (Bevan & Hood, 2006). This means that a good strategy may be to create measurements that serve your own interests. When what is visualized in numbers becomes important, it also becomes a matter of power and influence to take part in the decisions about what should be measured and how (Best, 2001). Bruno et al. (2014) called this type of countermove or numeric answers to someone else’s quantification “statactivism”, within a strategy they call “disclosure”. The purpose of the move in this case is to question or nuance what is selected as important facts by the management, “it is the number of cases, lags, and follow-ups that best describe the work load of the social workers”, which the social workers want to nuance with the answer: “It is also important how many times one covers for a colleague since this can affect your own statistics”. This is a clear example of how negotiations around numbers occur, as it is important what they show, or what part of reality they visualize.

However, it is worth noting that, even though the example shows that the social workers want to participate in setting the rules of the game, it is still the game that the managers have chosen to play. The countermove does not question the game per se, but rather confirms and strengthens it. When the activities that the management chose to visualize on the board were not perceived as fairly reflecting the work distribution, a countermove was made in terms of an addition to the model, instead of resisting it.

7. Summary and Discussion

Building on data from ethnographic fieldwork I have investigated practices unfolding around performance measurements in a social work setting. The analysis showed how comparisons based on social workers’ relative statistics can become a steering logic, guiding participants’ actions. Firstly, it was illustrated how certain conclusions leading to actions are almost automatically drawn from the numeric information presented on the board. When participants of the study compared themselves to each other and in relation to standards and goals, conclusions were drawn about what should be done by whom and in what order. The particular visualization of the work offered by the whiteboard was illustrated as important and motivating for some social workers. Secondly, I showed how the number-based comparative logic could take precedence as a driving force. This was partly apparent in respondents’ postures reflecting “pride” in accounts about rather working overtime than handing over cases to colleagues, and partly in an interaction where a social worker was given instructions with

repeated reference to comparatively unfavorable numbers. The number-based comparative logic had become embedded in an objectivity status, trumping any argument suggesting acting otherwise.

However, challenging theoretical approaches and studies showing how modern management and control systems become more sophisticated, leaving marginal space for discretion and resistance, I could also identify at least two different ways in which the intentions with the pulse boards were challenged and where the “governing by comparing” was, at least partially, interrupted. To start with: alternative logics to the one of the pulse board were proposed. At occasions where the numbers gave instructions for social workers to “hand over cases”, alternative logics related to the well-being of the client, practicalities of the overall work situation and professional values stating the opposite; “don’t mix the cases”, were put forward. The second interruption visible in my data came from a more “internalized” standpoint when the social workers perceived the numbers as reductive of the complexity in their work and chose to make a numerical addition to the model. This is an initiative that in one way reveals an acceptance of describing the work quantitatively including exposing it on the whiteboard. At the same time, the pulse board logic is challenged by their claim that there is a larger and more complex story behind the numbers and that they want to be a part of the choices made about what to measure. In a critique of theoretical approaches in the governmentality tradition, O’Malley et al. (1997, p. 510), among others, called for studies illuminating contestation, resistance and negotiation in the typically messy and unpredictable reality where governing happens. Even though no social worker in this study totally refused to participate in the comparative, numeric model, I have found examples of intentions to resist and negotiate in order to shape and influence the governing initiatives through provision of alternative interpretations and logics.

Out of the resistance strategies appearing in this article, the second one, in which the professionals themselves applied quantification, seems to have been more successful than resistance towards the model as such. At the same time as this made the exercise of influence possible, it also meant accepting a new language and a new logic for understanding and visualizing social work. Empirical research of the use of this language, and resistance towards using it, are important topics for future studies.

A final conclusion is that concerns about the pros and cons of the measurements diverted attention from client-focused work tasks. Questions concerning how the social workers should relate to clients were overshadowed by aspects of how the work should be measured and reported. For example, it is hard to imagine that the added marks on the board have any meaning outside of the internal work group. Previous studies have illuminated such attention displacement at national and supra-organizational (Bejerot & Hasselblad, 2013) and orga-

nizational management levels (Lynch-Cerullo & Cooney, 2011). Based on my study, similar results can be added from the everyday perspective of the social worker.

Acknowledgments

I want to thank all four anonymous reviewers for helpful comments and suggestions. I also acknowledge SF-Edit in San Francisco, USA, and Christine Antaya in Malmö, Sweden, for assistance in the language edition process.

Conflict of Interests

The author declares no conflict of interests.

References

- Abramovitz, M., & Zelnick, J. (2015). Privatization in the human services: Implications for direct practice. *Clinical Social Work Journal*, 43(3), 283–293.
- Ackroyd, S., & Thompson, P. (1999). *Organizational misbehaviour* (1st ed.). London: SAGE Publications.
- Atkinson, P. (2015). *For ethnography*. London: SAGE Publications.
- Baines, D. (2006). Whose needs are being served? Quantitative metrics and the reshaping of social services. *Studies in Political Economy*, 77, 195–209.
- Baines, D., Charlesworth, S., Turner, D., & O'Neill, L. (2014). Lean social care and worker identity: The role of outcomes, supervision and mission. *Critical Social Policy*, 34(4), 433–453.
- Bejerot, E., & Hasselblad, H. (2013). Forms of intervention in public sector organizations: Generic traits in public sector reforms. *Organization Studies*, 34(9), 1357–1380.
- Best, J. (2001). *Damned lies and statistics: Untangling numbers from the media, politicians, and activists* (1st ed.). London: University of California Press.
- Bevan, G., & Hood, C. (2006). What's measured is what matters: Targets and gaming in the English public health care system. *Public Administration*, 84(3), 517–538.
- Brodin, E. (2011). Policy work: Street-level organizations under new managerialism. *Journal of Public Administration Research and Theory*, 21(2), 253–277.
- Bruno, I., Didier, E., & Vitale, T. (2014). Statactivism: Forms of action between disclosure and affirmation. *The Open Journal of Sociopolitical Studies*, 7(2), 198–220.
- Czarniawska, B. (2007). *Shadowing and other techniques for doing fieldwork in modern societies* (1st ed.). Malmö: Liber.
- Dean, M. (1999). *Governmentality: Power and rule in modern society* (1st ed.). London: SAGE Publications.
- Dellgran, P., & Höjer, S. (2003). Towards autonomy? On theoretical knowledge in Swedish social work. *European Journal of Social Work*, 6(2), 145–161.
- Elg, M. G., Witell, L., & Gauthereau, V. (2007). *Att lyckas med förbättringsarbete-förbättra, förändra, förnya* [To succeed with improvement: Improve, change, renew]. Lund, Sweden: Studentlitteratur.
- Emerson, R., Fretz, R., & Shaw, L. (2011). *Writing ethnographic field notes* (2nd ed.). Chicago, IL: The University of Chicago Press.
- Espeland, W., & Stevens, M. (2008). A sociology of quantification. *European Journal of Sociology/Archives Européennes de Sociologie*, 49(3), 401–436.
- Fine, G. A. (1993). Ten lies of ethnography. Moral dilemmas of field research. *Journal of Contemporary Ethnography*, 22(3), 267–294.
- Foucault, M. (1988). Technologies of the self. In L. Martin, H. Gutman, & P. Hutton (Eds.), *Technologies of the self: A seminar with Michel Foucault* (1st ed., pp. 16–49). Amherst, MA: University of Massachusetts Press.
- Foucault, M. (1991). Governmentality. In G. Burchell, C. Gordon, & P. Miller (Eds.), *The Foucault effect: Studies in governmentality* (1st ed., pp. 87–104). Chicago, IL: University of Chicago Press. (Original work published 1978)
- Gallina, N. (2010). Conflict between professional ethics and practice demands: Social workers' perceptions. *Journal of Social Work Values and Ethics*, 7(2). Retrieved from www.jswwearchives.com
- Gilman, M. (2001). Legal accountability in an era of privatized welfare. *California Law Review*, 89(3), 569–642.
- Hauge, A. (2016). The organizational valuation of valuation devices: Putting lean whiteboard management to work in a hospital department. *Valuation Studies*, 4(2), 125–151.
- Hood, C. (1991). A public management for all seasons? *Public Administration*, 69(1), 3–19.
- Kurunmäki, L., & Miller, P. (2006). Modernising government: The calculating self, hybridisation and performance measurement. *Financial Accountability & Management*, 22(1), 87–106.
- Liedman, S. E. (2013). Pseudo-quantities, new public management and human judgement. *Confero: Essays on Education, Philosophy and Politics*, 1(1), 45–66.
- Lodge, M., & Gill, D. (2011). Toward a new era of administrative reform? The myth of post NPM in New Zealand. *Governance*, 24(1), 141–166.
- Lynch-Cerullo, K., & Cooney, K. (2011). Moving from outputs to outcomes: A review of the evolution of performance measurement in the human service nonprofit sector. *Administration in Social Work*, 35(4), 364–388.
- Martinell Barfoed, E., & Jacobsson, K. (2012). Moving from 'gut feeling' to 'pure facts': Launching the ASI interview as part of in-service training for social workers. *Nordic Social Work Research*, 2(1), 5–20.
- McGivern, G., & Ferlie, E. (2007). Playing tick-box games: Interrelating defences in professional appraisal. *Human Relations*, 60(9), 1361–1385.
- Miller, P., & Rose, N. (1990). Political rationalities and

- technologies of government. In S. Hänninen & K. Palonen (Eds.), *Texts, contexts, concepts: Studies on politics and power in language* (1st ed., pp. 166–183). Helsinki: The Finnish Political Science Association.
- National Board of Health and Welfare. (2014). *Handbok för utveckling av indikatorer—För god vård och omsorg* [In the name of good health care: Handbook for developing indicators]. Stockholm: National Board of Health and Welfare.
- Neyland, D. (2008). *Organizational ethnography* (1st ed.). London: SAGE Publications.
- O'Malley, P., Weir, L., & Shearing, C. (1997). Governmentality, criticism, politics. *Economy and Society*, 26(4), 501–517.
- Parton, N. (1998). Risk, advanced liberalism and child welfare: The need to rediscover uncertainty and ambiguity. *The British Journal of Social Work*, 28(1), 5–27.
- Paulsen, R. (2014). *Empty labor: Idleness and workplace resistance* (1st ed.). Cambridge: Cambridge University Press.
- Petersson, P., Olsson, B., Lundström, T., Johansson, O., Broman, M., Blucher, D., & Alsterman, H. (2012). *Ledarskap—Gör Lean till framgång* [Leadership: Making a success out of lean] (1st ed.). Malmö: Part Media.
- Pollitt, C. (1993). *Managerialism and the public services: Cuts or cultural change in the 1990s?* (2nd ed.) Oxford: Blackwell Business.
- Porter, T. (1994). Objectivity as standardization: The rhetoric of impersonality in measurement, statistics, and cost-benefit analysis. In A. Megill (Ed.), *Rethinking objectivity* (pp 197–237). Durham, NC: Duke University Press.
- Power, M. (1997). *The audit society: Rituals of verification* (1st ed.). Oxford: Oxford University Press.
- Power, M. (2004). Counting, control and calculation: Reflections on measuring and management. *Human Relations*, 57(6), 765–783.
- Rose, N., Valverde, M., & O'Malley, P. (2006). Governmentality. *The Annual Review of Law and Social Science*, 2(5), 83–103.
- Rose, N. (1991). Governing by numbers: Figuring out democracy. *Accounting, Organizations and Society*, 16(7), 673–692.
- Rosengren, C. (2015). Performing work: The drama of everyday working life. *Time & Society*. <https://doi.org/10.1177/0961463X15620983>
- Saetnan, A., Lomell, H., & Hammer, S. (Eds.). (2011). *The mutual construction of statistics and society* (1st ed.). New York, NY: Routledge.
- SALAR. (2014). *Leda för Resultat—Resultatstyrt förbättringsarbete* [Management for results: Result-oriented improvement work]. Stockholm: Swedish Association of Local Authorities and Counties.
- Shore, C., & Wright, S. (2015). Governing by numbers: Audit culture, rankings and the new world order. *Social Anthropology*, 23(1), 22–28.
- Stray, V., Sjøberg, D., & Dybå, T. (2016). The daily stand-up meeting: A grounded theory study. *Journal of Systems and Software*, 114, 101–112.
- Timmermans, S., & Epstein, S. (2010). A world of standards but not a standard world: Toward a sociology of standards and standardization. *Annual Review of Sociology*, 36, 69–89.

About the Author



Teres Hjärpe is a PhD candidate at the School of Social Work, Lund University, Sweden. Her dissertation assesses how numbers and quantification function when used to steer professionals in their everyday work, as is common in modern initiatives in public service organizations. This research focuses on questions of how “governing by numbers” is realized in everyday practice, and what adjustments, consequences and resistance can be identified. At the School of Social Work, she also has engagements in internationalization and in teaching social work practice and social work and disability.